

PROCUREMENT PLANNING MILESTONES (PPM)



RFP No:
RFP Title:

Agency:

Original Issue: mm/dd/yy			VERSION No. , mm/dd/yy		
Process Owner		Milestone	Target Date	Actual Date	Comments (For GTA AMO Use Only)
1 st	2 nd				
PRE-BID					
CO	A	Conduct Customer Kickoff Meeting			
A	CO	Submit RFP Requirements			
A	n/a	Submit Agreement			
CO	A	Draft RFP Complete			
A	CO	Submit Evaluation Tool			
CO	A	Final RFP Approval			
SOLICITATION					
CO	n/a	RFP Release to GPR			
A	CO	Vendor Questions Deadline			
CO	n/a	Post Answers to GPR			
CO	A	Conduct Offerors' Conference			
CO	EC	Conduct Evaluation Kickoff Meeting			
CO	A	RFP Proposals Due Date			
EVALUATION					
CO	n/a	Determination of Responsive Offerors			
EC	n/a	Conduct Technical Evaluation			
EC	CO	Technical Evaluation Complete			
CO	EC	Contracting Officer Review			
CO	EC	Price Information Provided			
EC	n/a	Price Evaluation Complete			
EC	CO	Conduct Best Value Review			
AWARD					
CO	n/a	Notify Apparent Successful Offeror			
A	CO	Identify Negotiation Points			
A	CO	Conduct Negotiations			
A	CO	Provide Contractor with Agreement			
A	n/a	Agency Execute Contract			
CO	n/a	Post Award Information to GPR			
POST AWARD					
A	n/a	Conduct Project Kickoff Meeting w/ Contractor			
A	n/a	Projected Contractor Work Start Date			
PLAN APPROVAL					
APPROVAL CONTACTS			NAME		TITLE
Contracting Officer:					N/A
Agency Point of Contact:					
Agency Sponsor/Executive:					
Agency Agreement Official:					
Evaluation Committee Chairperson:					

COMMENTS (Include name and date per day of entry)

CO – Contracting Officer A – Agency EC – Evaluation Committee GPR – Georgia Procurement Registry



PROCUREMENT PLANNING MILESTONES (PPM)

Instructions for AMO Form #1

Purpose:

The Procurement Planning Process is designed to aid in planning the necessary steps for the implementation of an effective procurement.

The following "Procurement Planning Milestones Instructions" offer specific direction for completing the Milestones document (PPM).

GTA AMO Process Engagement:

GTA intends to utilize the Procurement Planning Milestones document to fix those events and processes inherent with specific procurements, assigning primary (1st) and secondary (2nd) process owners as well as identifying those pertinent plan approval personnel who have an ongoing participation in the creation and / or finalization of the procurement in question.

Overview:

The Procurement Planning Milestones (PPM) document is an evolving document with milestone dates being provided based on discussion / negotiations between the assigned GTA Contracting Officer and the designated agency RFP developers.

Application:

By working backwards from a planned award date, the Procurement team should discover variables such as assigned staff, known vacation schedules for all involved personnel, holidays, and other events that could impact date selection. The dates listed should then reflect a flow of events leading to the completion of the procurement.

The PPM is used to assign primary (first position) and secondary (second position) process owners for each milestone where shown. In some cases a single process owner will be designated if appropriate to the procurement development effort.

The PPM comments section will be used primarily by the assigned Contracting Officer to indicate pertinent over-arching comments or responses to clarify areas of concern and to document the rationale for any slippage of the targeted dates. Revisions and target date adjustments will be confirmed via the development of a revised PPM that should show the signatures of agency developers. The "RFP Comments" area at the bottom of the PPM document is designed to allow agency and Contracting Officer summary information input relating to the procurement. All revisions to the original PPM document will be accompanied by a "revised" document that reflects the date of agreement, accompanied by supporting e-mail or other documentation by offering confirmation from all identified "Plan Approval" officials.

In the event that agencies are unable to assist in the creation of accurate timeline dates, the Contracting Officer may be required to develop ad hoc dates that may be used by the agency for eventual timeline creation.



PROCUREMENT PLANNING MILESTONES (PPM)

Instructions for AMO Form #1

Agency Responsibilities:

The agency will assume primary responsibility roles in those areas identified in the "Process Owner" segment of the PPM whether primary (1st) or secondary (2nd) level of involvement.



PROCUREMENT PLANNING MILESTONES (PPM)

Instructions for AMO Form #1

Milestone 1

Phase:	Pre-bid	Process Owner:	CO	Milestone:	Conduct Customer Kickoff Meeting	Timeframe:	5 business days from receipt of GTA Approval
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Collaborative Process Owner: Agency

Milestone Definition:

This meeting formally begins the procurement process and may involve more than one meeting.

Purpose of meeting:

- Discuss Procurement Planning Milestone (PPM) process.
- Develop PPM timeline
- The PPM timeline should include, but not be limited to the following:
 - Requirement Development
 - Purpose
 - Background/History
 - Definitions
 - Determine Evaluation Methodology
 - Selection of the Evaluation Chair and Committee
 - Evaluation Tools Development
 - Drafting of the RFP
 - Approval and Release of the RFP.
 - Solicitation "Street" Time
 - Offeror's Conference
 - Contract Terms and Conditions
 - Evaluation Procedure
 - Technical Evaluation
 - Cost/Price Evaluation
 - Best Value Selection
 - Negotiation Procedures
 - Award Procedures
 - Post Award Procedures
 - Contractor Start Work Schedule

Prerequisites for this meeting should be:

- The business case approval from GTA.
- A signed approval letter from GTA is needed to ensure compliance with the reviewers of the request.

Milestone 2

Phase:	Pre-bid	Process Owner:	A	Milestone:	Submit RFP Requirements	Timeframe:	A minimum of 30 days.
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Collaborative Process Owner: Contracting Officer

CO – Contracting Officer

A – Agency

EC – Evaluation Committee



PROCUREMENT PLANNING MILESTONES (PPM)

Instructions for AMO Form #1

Milestone Definition:

The first consideration in requirements development should be how we want to size and price our requirement. This will focus our attention on what we want the vendor to provide in their submission of the proposal.

The business requirements comprise the heart of the RFP. The technology requirements should be a detailed understanding of solutions that will satisfy the business and technology requirements. Additionally, these requirements should be a part of the Agency Request for Technology (ART). Special terms and conditions should be part of the requirements, such as demonstrations, bonding, acceptance testing, service levels and other requirements that will provide a best value Procurement. The time between the kickoff meeting and the completion of requirements greatly varies depending on the complexity of the requirements. A dedicated team of Agency Subject Matter Experts (SMEs) can usually develop requirements within a week to ten day time period. However the complexity of the requirements may add to the time frame.

Milestone 3

Phase:	Pre-bid	Process Owner:	A	Milestone:	Submit Agreement	Timeframe:	Five to ten business days.
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Milestone Definition:

The identified "Agency Agreement Official" will be the person responsible for providing an approved agreement for inclusion in the posted RFP. The Agency Agreement Official will be primarily responsible for interfacing with internal agency or external (Attorney General's Office) sources to provide an instrument that reflects the intents contained in the RFP itself.

Milestone 4

Phase:	Pre-bid	Process Owner:	CO	Milestone:	Draft RFP Complete	Timeframe:	Five to ten business days
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Collaborative process Owner: Agency

Milestone Definition:

The GTA Contracting Officer will take the requirements and evaluation methodology and add the necessary "standard" and "specialized" RFP language to formulate a draft RFP. This draft should be the starting point for further development. The Contracting Officer will work with the customer to incorporate all known requirements into the draft and additionally, provide for the evaluation of these requirements.

A finalized evaluation tool should be reviewed by the agency and GTA to ensure that a good evaluation can be completed based on the requirements of the RFP.

Milestone 5

CO – Contracting Officer

A – Agency

EC – Evaluation Committee



PROCUREMENT PLANNING MILESTONES (PPM)

Instructions for AMO Form #1

Phase:	Pre-bid	Process Owner:	A	Milestone:	Submit Evaluation Tool	Timeframe:	Varies
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Collaborative Process Owner: Contracting Officer

Milestone Definition:

To determine what solution(s) will satisfy the requirements, there needs to be an evaluation methodology to be able to evaluate the various solutions submitted by the vendor community. This is most critical to the success of the RFP. An evaluation tool should be the outcome of this step in the process. The tool justifies the best value solution. A rule of thumb to consider is: if we ask for it, we should be able to evaluate it. We should ask vendors to provide enough information to allow us to make a best value decision.

The RFP will not be released without the development of a draft evaluation tool.

Milestone 6

Phase:	Pre-bid	Process Owner:	CO	Milestone:	Final RFP Approval	Timeframe:	One to five business days
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Collaborative Process Owner: Agency

Milestone Definition:

A review of the RFP document must be accomplished by all parties, however, when the GTA Contracting Officer provides the final RFP to the customer for review, the GTA staff will have completed their review.

The customer should ensure the draft RFP has all the necessary requirements, evaluation methodology and terms and conditions to meet their business and legal needs. The GTA Contracting Officer will ensure that the document is biddable, competitive and non restrictive.

Milestone 7

Phase:	Solicitation	Process Owner:	CO	Milestone:	RFP Release to GPR	Timeframe:	One business day
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Milestone Definition:

Once the RFP has been approved, the GTA Contracting Officer will post the document to the Georgia Procurement Registry (GPR). This posting will include all documents associated with the RFP.

After this date, all correspondence regarding the RFP must go through the Contracting Officer. This restriction remains in place until the contract award.

Per GTA Procurement Rules, a five (5) business-day RFP specifications protest becomes applicable from the date of RFP release.



PROCUREMENT PLANNING MILESTONES (PPM)

Instructions for AMO Form #1

Milestone 8

Phase:	Solicitation	Process Owner:	A	Milestone:	Vendor Questions Deadline	Timeframe:	At least five business days after release date
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Collaborative Process Owner: Contracting Officer

Milestone Definition:

This is usually the date that all vendor questions have been received. The Contracting Officer will coordinate all responses to all submitted questions.

Milestone 9

Phase:	Solicitation	Process Owner:	CO	Milestone:	Post Answers to GPR	Timeframe:	At least five business days prior to proposal due date
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Milestone Definition:

All questions and answers (Q&A) will be posted on the GPR. Agencies should take care when answering questions. Answers to questions that change the understanding or meaning of the RFP should be formally added to the RFP through the issuance of an addendum. The Contracting Officer will prepare the addendum for review. Once all parties agree to the content, the addendum is posted to the GPR.

Milestone 10

Phase:	Solicitation	Process Owner:	CO	Milestone:	Conduct Offerors' Conference	Timeframe:	At least five to ten days after release date
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Collaborative Process Owner: Agency

Milestone Definition:

Although this may be an optional event, the complexity of the RFP will dictate whether or not to conduct a conference.

A conference allows for the free flow of dialog with interested bidders. There are pitfalls to conducting a conference; however there can be great benefit gained.

Milestone 11

Phase:	Solicitation	Process Owner:	CO	Milestone:	Conduct Evaluation Kickoff Meeting	Timeframe:	One to five days prior to due date
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Collaborative Process Owner: Evaluation Committee

Milestone Definition:

CO – Contracting Officer

A – Agency

EC – Evaluation Committee



PROCUREMENT PLANNING MILESTONES (PPM)

Instructions for AMO Form #1

The Contracting Officer will work with the Evaluation Committee Chairperson to schedule a time and date for a kickoff meeting with the Evaluation Committee. All evaluation committee members should be present at this meeting. The Contracting Officer will go over the administration rules for the evaluation committee. Additionally, each member of the committee will be required to acknowledge receipt of these rules and physically sign an "RFP Evaluation Committee Rules" document to document their concurrence.

The Chairperson will receive the responsive proposals for the committee from the Contracting Officer. The evaluation tool will be explained and reviewed.

Milestone 12

Phase:	Solicitation	Process Owner:	CO	Milestone:	RFP Proposal Due Date	Timeframe:	At least 15 days after release date
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Collaborative Process Owner: Agency

Milestone Definition:

The Contracting Officer will receive proposals at GTA on the date and time posted on the website. It is suggested that the length of time the RFP would remain on the "street" is really a matter of the complexity of the RFP. GTA procurement rules state a minimum of 15 days.

Milestone 13

Phase:	Evaluation	Process Owner:	CO	Milestone:	Determination of Responsive Offerors	Timeframe:	One to three business days, depending on number of responses
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Milestone Definition:

This task is performed by the Contracting Officer in accordance with the RFP.

Milestone 14

Phase:	Evaluation	Process Owner:	EC	Milestone:	Conduct Technical Evaluation	Timeframe:	Varies depending on the complexity of RFP
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Milestone Definition:

The Chairperson will coordinate the Evaluation Committee in a review of all responsive proposals received. The evaluation tool will be used by each evaluator to determine individual evaluations. Comments must be made by each evaluator for each vendor's response to the requirements set forth in the RFP and displayed on the Evaluation Tool.



PROCUREMENT PLANNING MILESTONES (PPM)

Instructions for AMO Form #1

Evaluators may work independently or in groups. The governance of the committee will be directed by the Chairperson. The Chairperson will be responsible for the evaluation committee's actions during the evaluation, to include maintaining a secure environment for the proposal materials.

Milestone 15

Phase:	Evaluation	Process Owner:	EC	Milestone:	Technical Evaluation Complete	Timeframe:	Will depend on the governance of the Evaluation Committee
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Collaborative Process Owner: Contracting Officer

Milestone Definition:

The Chairperson will combine the individual comments and score from each member and provide the Contracting Officer an overall consensus evaluation of the technical portion of the RFP.

Milestone 16

Phase:	Evaluation	Process Owner:	EC	Milestone:	Conduct Technical Consensus Meeting	Timeframe:	Will depend on the governance of the Evaluation Committee
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Collaborative Process Owner: Contracting Officer

Milestone Definition:

Consensus is the key to a successful evaluation. The Chairperson should bring together the committee for at least one meeting to gather individual comments to the proposals and seek a common consensus with the committee members for each proposal. The Contracting Officer may attend this meeting. After consultation with the Contracting Officer, a decision will be made regarding the need for the issuance of Clarifications to those vendors under active consideration.

Milestone 17

Phase:	Evaluation	Process Owner:	CO	Milestone:	Contracting Officer Review of Technical Evaluation	Timeframe:	One to five business days from receipt of the Committee's Technical Evaluation
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Collaborative Process Owner: Evaluation Committee

Milestone Definition:

The Contracting Officer will review the findings of the consensus evaluation performed by the committee. The Technical Evaluation will be considered as complete once the Contracting Officer has received and approved the technical consensus finding from the evaluation committee.

Milestone 18

CO – Contracting Officer

A – Agency

EC – Evaluation Committee



PROCUREMENT PLANNING MILESTONES (PPM)

Instructions for AMO Form #1

Phase:	Evaluation	Process Owner:	CO	Milestone:	Cost/ Price Information Provided	Timeframe:	One to three business days
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Collaborative Owner: Evaluation Committee

Milestone Definition:

Once the Contracting Officer has completed the review of the technical evaluation, he or she will provide the Chairperson and the committee with cost/price proposals of the leading bidders in accordance with the RFP.

Milestone 19

Phase:	Evaluation	Process Owner:	EC	Milestone:	Cost / Price Evaluation Complete	Timeframe:	One to three business days
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Milestone Definition:

The Evaluation Committee will evaluate the cost/price proposals in accordance with the RFP.

Milestone 20

Phase:	Evaluation	Process Owner:	EC	Milestone:	Conduct Best Value Review	Timeframe:	Will depend on the governance of the Evaluation Committee
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Collaborative Process Owner: Contracting Officer

Milestone Definition:

Evaluation Committee - The Chairperson should bring together the committee for at least one meeting to gather individual comments to the proposals and seek a common consensus for each of the leading proposals. The Contracting Officer may attend this meeting.

Contracting Officer - The Contracting Officer will make a determination in accordance with the Evaluation Committee and the RFP, the apparent successful bidder. Supporting documentation is essential in determining and justifying the State's selection.

All Other Stakeholders - Other parties involved in the procurement.

Please understand that the evaluation documentation serves to show the method and procedures used to evaluate one vendor from another. It is very important to provide good documentation as product of the evaluation.

Milestone 21

Phase:	Evaluation	Process Owner:	CO	Milestone:	Notify Apparent Successful Offeror	Timeframe:	One business day
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PROCUREMENT PLANNING MILESTONES (PPM)

Instructions for AMO Form #1

Milestone Definition:

The apparent successful bidder is notified by the Contracting Officer.

Milestone 22

Phase:	Award	Process Owner:	A	Milestone:	Identify Negotiation Points	Timeframe:	Will depend on the number and complexity of issues.
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Collaborative Process Owner: Contracting Officer

Milestone Definition:

Discussion / Negotiation / Resolution points should be provided to the apparent successful bidder to allow for issues that impact on the scope of work for the agency and the contractor. These may include:

- Performance Milestones
- Payment Requirements
- Payment Milestones
- Actual Liquidated Damages Amounts
- Project Timeline
- Personnel Timeline
- Office Usage

Milestone 23

Phase:	Award	Process Owner:	A	Milestone:	Conduct Negotiations	Timeframe:	Will depend on the number and complexity of issues.
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Collaborative Process Owner: Contracting Officer

Milestone Definition:

The Contracting Officer will provide for the resolution of these points through direct contact with the apparent successful bidder (ASB). This could be handled in several methods:

- face-to-face
- conference calls
- on site

Milestone 24

Phase:	Award	Process Owner:	A	Milestone:	Provide Contractor with Contract	Timeframe:	One business day
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Collaborative Process Owner: Contracting Officer

Milestone Definition:



PROCUREMENT PLANNING MILESTONES (PPM)

Instructions for AMO Form #1

The Contracting Officer will provide the ASB with the contract incorporating all agreed upon points. The ASB will sign and return to Contracting Officer.

Milestone 25

Phase:	Award	Process Owner:	A	Milestone:	Agency Execute Contract	Timeframe:	One business day
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Milestone Definition:

The Contracting Officer will be provided at least 3 signed copies of the contract from the agency. The original contract will be maintained within the agency if an agency bid or within GTA if a GTA initiative.

Copy 1 – Agency

Copy 2 – Contractor

Copy 3 – GTA File (Contracting Officer)

Milestone 26

Phase:	Award	Process Owner:	CO	Milestone:	Post Award Information to GPR	Timeframe:	One business day
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Milestone Definition:

The Contracting Officer will post the award to the GPR as awarded. Additionally, the Contracting Officer will send a Notice of Award to the successful contractor. A letter will also be generated by the Contracting Officer to all the non-successful vendors.

Per GTA Procurement Rules (665-2-11-.07), a five (5) business-day RFP award protest becomes applicable from the date of RFP award posting.

Milestone 27

Phase:	Post Award	Process Owner:	A	Milestone:	Conduct Project Kickoff Meeting w/ Contractor	Timeframe:	Will vary pending scheduling constraints
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Milestone Definition:

The agency will coordinate with the successful vendor to review the contractual and practical issues of the project. For example:

- Vendor daily starting times
- Employee security (entry procedures)
- Communications contacts (agency and contractor)
- Payment issues (When, where and for what)

These are only a few issues that will need further coordination.

Milestone 28

CO – Contracting Officer

A – Agency

EC – Evaluation Committee



PROCUREMENT PLANNING MILESTONES (PPM)

Instructions for AMO Form #1

Phase:	Post Award	Process Owner:	A	Milestone:	Projected Contractor Work Start Date	Timeframe:	Will vary pending scheduling constraints
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Milestone Definition:

The agency will negotiate this date with the successful vendor and should be made part of the contract.



PROCUREMENT PLANNING MILESTONES (PPM)

Instructions for AMO Form #1

Additional Comments:

Original Issue: mm/dd/yy			REVISION No. __, mm/dd/yy			(For GTA AMO Use Only)		
Definitions	<ul style="list-style-type: none">Original issue: Establishes the timeframe when the initial PPM document was signed by all parties identified in the Plan Approval section.							
	<ul style="list-style-type: none">Revision No.: Identifies subsequent modifications to the original document reflected in dates of agreement achieved by the parties defined in the Plan Approval section.							

KEY CONTACTS	NAME & TITLE	E-MAIL ADDRESS
Contracting Officer:		
Agency Point of Contact:		
Agency Contract Official:		
Evaluation Committee Chairperson:		
ROLE	DEFINITION	
Contracting Officer:	The designated GTA procurement official for the procurement in question.	
Agency Point of Contact:	The designated agency liaison person through whom communications flow.	
Agency Contract Official:	The agency official responsible for contract development and resolutions to Offeror exceptions when an Agency developed contracts or GTA's Agency Agreement is used.	
Evaluation Committee Chairperson:	The agency stakeholder who administers the activity of the Evaluation Committee with primary responsibility of implementing a cogent consensus position, vis-à-vis the vendor (s) under consideration.	

COMMENTS (Include name and date per day of entry)	
Comments	The Contracting Officer and / or the agency may input over-arching comments relative to general procurement development issues.